



COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

DEFERRED COMPENSATION PROGRAM MANAGER

Class No. 002448

■ POSITION PURPOSE

To supervise, oversee and perform work related to the administration of the Deferred Compensation Plan available to county employees; and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

Under general direction, the Deferred Compensation Program Manager is responsible for the management and administration of the County's Deferred Compensation Program, including the 457, 401(a) and terminal pay plans, as well as other plans that may be added in the future.

■ FUNCTIONS

The examples of essential functions listed in this class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.

Essential Functions:

1. Makes presentations to new and current employees.
2. Develops and implements strategies to increase participation and improve services.
3. Supervises the deferred compensation staff to ensure timely and accurate processing of enrollments, contribution changes, catch-up contributions, withdrawals, loans and rollovers.
4. Interviews, selects, and trains staff.
5. Coordinates presentations, educational seminars, outreach meetings, and services with providers and vendors.
6. Provides written/verbal information and assistance to participants.
7. Ensures that program materials, forms and information are current and up to date, including website information.
8. Coordinates with the Auditor & Controller Department's Payroll Division and other departmental Payroll Clerks to ensure proper processing of deductions and payouts.
9. Provide courteous, high quality service to members of the public by personally responding to requests for service or appropriate referral.
10. Serves on the Deferred Compensation Oversight Committee.
11. Reviews and revises the Deferred Compensation Investment Policy Statement on an annual basis.
12. Participates in an annual review of investment selections, and manages and oversees the RFP process.

■ KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- IRS rules and regulations pertaining to deferred compensation plans.
- County customer service objectives and strategies.
- General governmental accounting and bookkeeping principles and practices.

Skills and Abilities to:

- Compile, organize, analyze and interpret data.
- Communicate effectively orally and in writing.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in situations, which require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.
- Supervise and train subordinate personnel.
- Reconcile bank statements and records using personal computers and other office equipment.
- Prepare specific and general financial reports.
- Establish effective working relationships with county staff and outside institutions and agencies.
- Interpret financial reports and legal documents.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are:

1. A bachelor's degree in finance, accounting, business administration or related field from an accredited college or university; AND,
2. Three (3) years of professional level accounting, financial, or administrative/budget analysis. Such experience must have been at the level of an Administrative Analyst III within the County of San Diego. Four (4) years of related, professional full-time experience may substitute for the education requirement.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Frequent: standing, sitting, side-to-side turning of neck; fine finger dexterity to operate keyboards and writing materials.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own personal vehicle.

Certification/Registration

None required.

Working Conditions

Office environment; exposure to computer screens.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

New: May 18, 2001

Revised: October 21, 2003

Retitled: January 9, 2004 (From: Supervisor, Deferred Compensation)

Revised: May 6, 2004

Deferred Compensation Program Manager (Class No. 002448)

Union Code: MM

Variable Entry: Y